

Please complete accurately, using CAPITAL/BLOCK LETTERS in blue or black ink. Tick blocks where appropriate.

FUND DETAILS
Protektor Preservation Pension Fund

Reference numbers

Protektor Preservation Provident Fund

Reference numbers

PLEASE SEND THE COMPLETED FORM TO:

Email protektor@oldmutual.com
Fax +27 021 509 2125

Note: If you have emigrated or your Visa has expired, please make use of the Withdrawal Request for Visa Expiry, Cessation of SA Residency and Emigration Withdrawal form

COMPLIANCE WITH THE PROTECTION OF PERSONAL INFORMATION ACT (PPI, POPI)

Protektor Preservation Fund may collect, use and share your personal information for the following purposes:

- To administer your membership of the Protektor Preservation Fund;
- To provide you with information about offerings that will support and enhance your retirement benefits;
- To provide products or services to you, to carry out the transaction you requested and to maintain our relationship;
- For underwriting purposes;
- To assess and process claims;
- To conduct credit reference searches or verification;
- To confirm and verify your identity, address or banking details;
- To verify that you are an authorised user for security purposes;
- For maintaining the accuracy of your personal information;
- For operational purposes, and where applicable, credit scoring and assessment and credit management;
- For purposes of claim checks (e.g. the Industry Life and Claims Register);
- For the detection and prevention of fraud, crime, money laundering or other malpractice;
- To trace you where you are uncontactable;
- To conduct market or customer satisfaction research or for statistical analysis;
- For audit and record keeping purposes;
- For social responsibility purposes;
- In connection with legal proceedings;
- Sharing information with your employer (its intermediary/broker), your intermediary/broker (when applicable), service providers we engage to process such information on our behalf or who render services to us. These service providers may be abroad, but we will not share your information with them unless we are satisfied that they have adequate security measures in place to protect your personal information;
- To comply with legal and regulatory requirements or industry codes or when otherwise allowed by law.

You agree that we may view, search and update your information and you further agree we may, where required, process your special personal information (and share this information with relevant third parties) in order to achieve a purpose set out above.

You warrant that when you give us personal information about third parties, this information is accurate and correct, and you have received their permission to share their personal information with us.

You confirm that if you are giving consent for a person under 18 (a minor) you have the required authority to do so.

We may transfer your personal information to another country for processing or storage. We will ensure that anyone to whom we pass your personal information agrees to treat your information with the same level of protection as we are obliged to.

You may access the personal information that we hold about you and may also request us to correct any errors or, under certain circumstances request us to delete this information. In certain circumstances, you have the right to object to the processing of your personal information. To do this, simply contact us at the numbers/addresses listed below and specify what information you would like or if you have any questions about this Notice, please contact us at:

- Member Call Centre: 0860 20 30 40
- protektorenquiriescomplaints@oldmutual.com

You have the right to complain to the Information Regulator, whose contact details are:

- www.justice.gov.za/inforeg/index.html
- General enquiries: enquiries@infoeregulator.org.za

Complaints (complete POPIA/PAIA form 5)

- paiacomplaints@infoeregulator.org.za should your PAIA request be denied or there is no response from a public or private bodies for access to records you may use this email address to lodge a complaint.
- popiacomplaints@infoeregulator.org.za should you feel that your personal information has been violated, you may use this email address to lodge a complaint.

Please visit <https://www.oldmutual.co.za/corporate/protektor-preservation/protektor-customer-privacy-notice> to read the full version of the Fund Member Privacy Notice.

SECTION 1 MEMBER DETAILS

Surname

First name(s)

Identity number (passport number if foreign national)

Passport country of issue

Address

Postal code

Suburb

City

Telephone Code No. Cellphone number

Email address

Please enclose an original certified copy of your identity document.

SECTION 2 WITHDRAWAL BENEFIT PAYMENT OPTIONS

Please complete Section 2A if you are making a full withdrawal or Section 2B if you are making a partial withdrawal.

SECTION 2A FULL WITHDRAWAL

Full Cash withdrawal

Part Cash/Part Transfer to another approved Fund

- Cash amount before tax R
- Please specify to which approved Fund (including a Preservation Fund) the remainder of your savings should be transferred:
Full name of approved fund

Transfer full benefit to another approved fund*

*Please attach a copy of your proposal or application form.

SECTION 2B PARTIAL WITHDRAWAL

Cash amount before tax** R

**Please note that you cannot take another cash withdrawal from this investment.

SECTION 3 YOUR INCOME TAX DETAILS

Tax number

SECTION 4 COURT ORDERS

Do you have any divorce order(s) and/or maintenance court order(s) against your benefit? YES NO

If "YES", please attach: - original certified copy/copies of the relevant court order(s); and
- in the case of divorce court order(s), contact details of your former spouse/s (if not already supplied to Old Mutual)

SECTION 5 YOUR BANK ACCOUNT DETAILS

Name of account holder

Bank name Branch name

Account number Bank branch code

Account type: Cheque Savings

SECTION 6 DECLARATION BY MEMBER

- I understand that Old Mutual will deposit my benefit into the above account upon receipt of the necessary tax clearance from the South African Revenue Service.
- I understand that payment of my full investment amount in terms of the Rules of the Protektor Pension Fund/Provident Fund as requested above shall be in full and final settlement of the aforesaid Fund's liability towards me in respect of my investment therein.
- I understand that other deductions may be made from the withdrawal benefit in terms of Section 37D of the Pension Funds Act, the Maintenance Act and/or the Divorce Act, prior to the payment of the withdrawal benefit to me.
- I understand that where the withdrawal is:
 - a full withdrawal; I will have no further claim against the Protektor Preservation Fund in respect to my initial investment.
 - a partial withdrawal; I cannot take another cash withdrawal from this investment, and my balance will only be payable to me on retirement, death or disability in terms of the Rules of the Fund; or on emigration/Visa expiry (subject to the terms allowed in the Income Tax Act).

Member's signature

Date

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